



Beneficiary Designation

Purpose of the Form

- Use this form to designate beneficiaries to receive your PERSI Base Plan and Choice Plan death benefits.

Instructions

- Read "About Form RS115," attached.

Member Information					
Name First		Middle	Last	Social Security Number	
Mailing Address	Street or P.O. Box				
	City		State	Zip Code	
Daytime Phone Number Area Code		Phone Number			
Marital Status <input type="checkbox"/> Single <input type="checkbox"/> Married Note: Remember to submit a new <i>Beneficiary Designation</i> if your marital status changes and a <i>Member Name Change</i> (RS111) if your name changes.					

Primary Beneficiary or Beneficiaries					
Name	Social Security or Tax ID Number	Date of Birth	Gender (M or F)	Relationship to You	Benefit % (must = 100%)

Secondary Beneficiary or Beneficiaries					
Name	Social Security or Tax ID Number	Date of Birth	Gender (M or F)	Relationship to You	Benefit % (must = 100%)

Member Acknowledgment	
I understand the instructions and information under "About Form RS115." I revoke all previous PERSI beneficiary designations and request that any PERSI benefits payable after my death be made as indicated herein. I may change this designation by filing a new form. This designation applies to my PERSI Base and Choice Plan accounts.	
Signature	Date



About Form RS115

Instructions

- 1 Complete the form. If more space is needed, attach an additional signed and dated sheet of paper.
- 2 Send the form to PERSI.

Note: The form is not valid unless signed, dated, and on file with PERSI.

Types of Beneficiaries

- **Primary beneficiary or beneficiaries.** The first person or persons to receive death benefits when you die. If you select one person only, he or she receives 100% of the benefits.
- **Secondary beneficiary or beneficiaries.** Person or persons to receive death benefits if no primary beneficiary or beneficiaries are alive when you die.
- **Default beneficiary.** If PERSI does not have a beneficiary designation on file, death benefits are paid by law (Idaho Code §15-2-103) to the following: (1) To your surviving spouse. (2) If you have no surviving spouse, to your estate. If you agree with this legal distribution and you have not previously submitted a beneficiary designation form, you do not need to designate a beneficiary or submit this form. However, payment of death benefits could be slowed if PERSI has no designation on file.

Notes About Designating Beneficiaries

- Choose your beneficiaries carefully. Your PERSI funds might be your largest financial asset.
- If you select two or more people as primary or secondary beneficiaries, indicate what percentage each is to receive (the percentages must equal 100%).
- Always provide full names (Mary Elizabeth Smith, **not** Mary Smith). For a married woman, use her full name (Mary Elizabeth Smith, **not** Mrs. Bob Smith). Include the relationship to you.
- This beneficiary designation is for PERSI Base Plan and Choice Plan death benefits **only**. Any designations you make for a will or an insurance policy do not substitute for the PERSI beneficiary designation.
- Percentages must be in whole numbers. Do **not** use partial numbers. For example, use 33%, not 33⅓%.
- You can change your designations at any time by submitting a new *Beneficiary Designation* (RS115).
- If you make an error, initial and date any corrections.

Minor Children, Trusts, Wills, and Charities as Beneficiaries

- **Minor children.** If minor children are involved, payment may be made under the Uniform Transfer to Minors Act. To name all of your children to share equally, write "All my living children" as the beneficiary. If you wish them to have different percentages, list the children separately.
- **Trusts.** If you want to designate your Living Trust, show the date of the trust agreement and the name(s) of the Trustee(s). If a bank or trust company is the Trustee, attach a separate document containing the Trustee's address. Provide PERSI with a copy of the trust's registration, if available.
- **Wills.** Write "the Executor of my Estate" or "the Administrator of my Estate" to designate your estate as beneficiary. Do not name the executor, because the executor will be appointed later by the court.
- **Charities.** You can name a charity as beneficiary. For more information about payment of death benefits to charities, PERSI recommends that you consult with a qualified attorney.

Example 1

Primary Beneficiary or Beneficiaries					
Name	Social Security or Tax ID Number	Date of Birth	Gender (M or F)	Relationship to You	Benefit % (must = 100%)
Phillip Lee Thompson	000-01-0011	07-11-1937	M	Spouse	100%

Secondary Beneficiary or Beneficiaries					
Name	Social Security or Tax ID Number	Date of Birth	Gender (M or F)	Relationship to You	Benefit % (must = 100%)
All my living children					80%
Rebecca Joan Smith	000-02-0220	01-02-1958	F	Sister	20%

Example 2

Primary Beneficiary or Beneficiaries					
Name	Social Security or Tax ID Number	Date of Birth	Gender (M or F)	Relationship to You	Benefit % (must = 100%)
Sally Jones	000-03-0033	08-21-1970	F	Daughter	34%
Alice Jones	000-04-0044	11-14-1972	F	Daughter	33%
Andrew Jones	000-05-0055	02-29-1975	M	Son	33%

Secondary Beneficiary or Beneficiaries					
Name	Social Security or Tax ID Number	Date of Birth	Gender (M or F)	Relationship to You	Benefit % (must = 100%)
The administrator of my estate				Estate	100%